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Bilzin Sumberg is a Miami-based commercial law firm which represents a wide range of domestic and international clients, from high-net-worth individuals, entrepreneurs, investors, and developers to Fortune 500 companies. Bilzin Sumberg is the firm of choice for international companies doing business in Florida, and is at the helm of many of the region's exciting projects and most complex cases.

A strong proponent of technology investment, the firm's leadership understands the importance of using technology to develop and maintain strong client relationships. The firm has been using LexisNexis® InterAction® as their CRM system since 2005.

Paul VanderMeer, Chief Knowledge Officer at Bilzin Sumberg, explains his approach: "While InterAction is arguably the go-to CRM platform in the legal space, we also recognized some of its mechanics created barriers to effective contact management and business development reporting. Because it was important to us to use a CRM system effectively and extract the most value we could from our investment in the system, we sought out other third parties to better harness and share the data."

After discovering Fellsoft's products in late 2013, Paul quickly saw that they could be of real benefit to the firm. Paul comments: "We use AlertsPlus to keep our attorneys abreast of what's happening with their client relationships in a way that's timely and effortless for them. Additionally, FeedWatch allows us to bring relevant external news from a wide range of sources into InterAction, with minimal effort. Fellsoft's products have really helped us deliver on our vision of how we want to use InterAction."



Bilzin Sumberg

In 2017, Bilzin turned to Fellsoft to help with another requirement – gathering a complex set of information on specific contacts from InterAction, presenting it to users in a straightforward way and then allowing the user to easily update their contacts. Paul explains: "We worked with Fellsoft to clarify our requirements, then implemented the Panels product with a template containing our specific application. It's proved to be a very adaptable piece of software and has turned a process that was previously complicated and inconsistent into something very simple for our users to manage."

Paul concludes: "Fellsoft products are simple to implement, well supported, and the support team is one which truly listens to and understands our requirements."

Featured Products



AlertsPlus



FeedWatch



Panels